

QUICK START: Financial Management - Dashboard

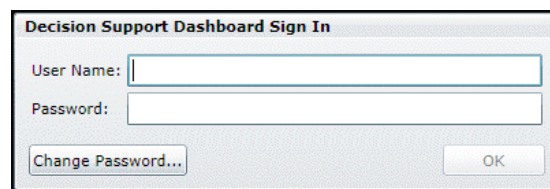
Description

In this example, we'll log into the Decision Support dashboard, create a new dashboard tab, and add and configure multiple gadgets on the new dashboard tab. The purpose of the example is to highlight some base features and customizable options of the dashboard product.

Walkthrough

Login

Browse to the Decision Support dashboard (typically located at <http://<dssservername/>dssdashboard/dashboard.aspx>) and sign in using your username and password.



Decision Support Dashboard Sign In

User Name:

Password:

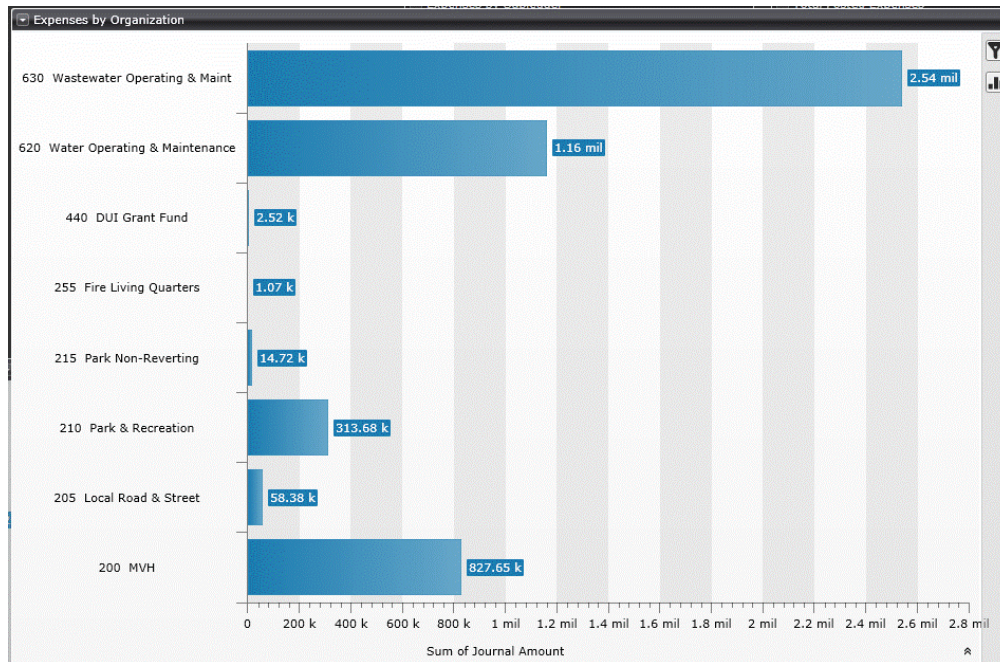
[Change Password...](#)

Home Page

After logging in, the Dashboard home page is displayed. This view is standard for all users and is used to convey standard metrics across an organization.

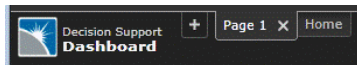


Each gadget can be maximized to examine the data in more detail by clicking the maximize button in the upper right corner. Clicking the box will return to the regular view.



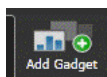
Create New Tab

Below the dashboard main screen, there are tabs for other dashboard views. Click the plus sign to add a new tab to the dashboard.

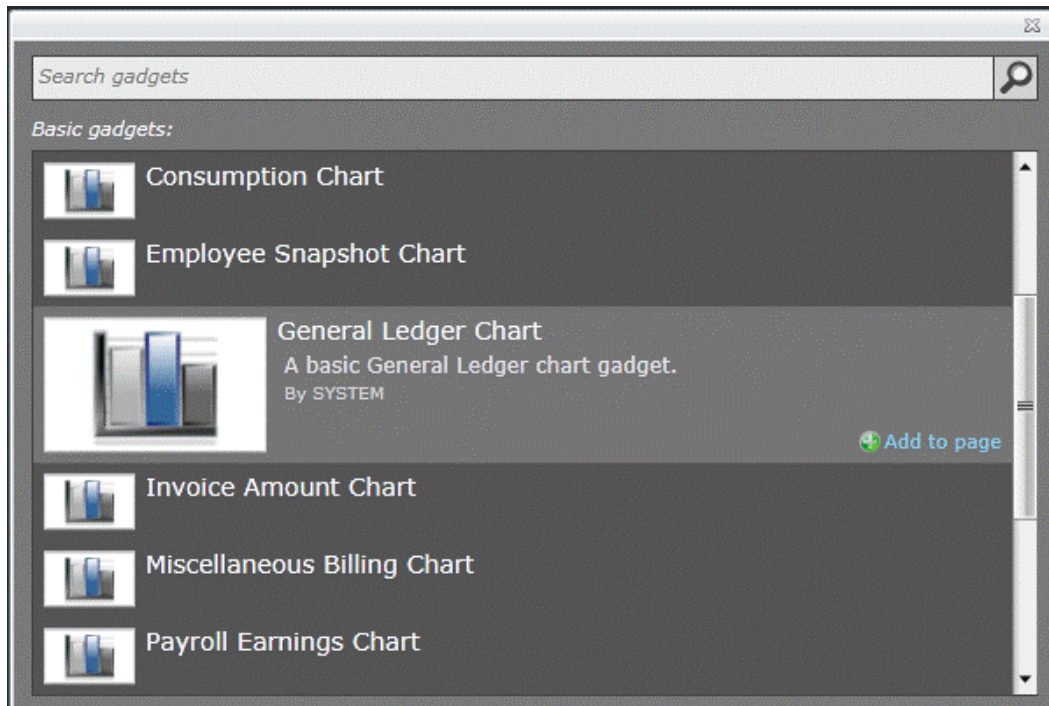


Add Gadgets

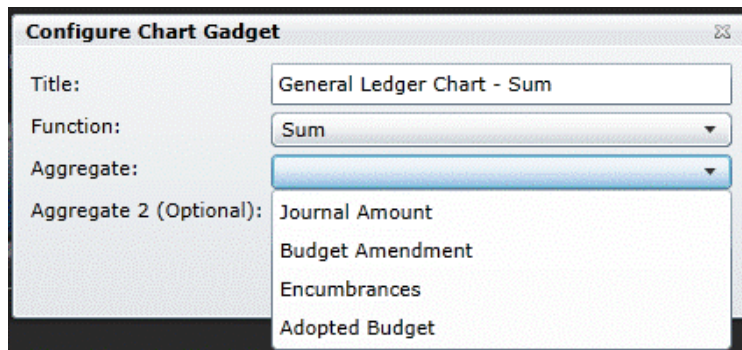
To add gadgets, click the **Add Gadget** button in the lower right.



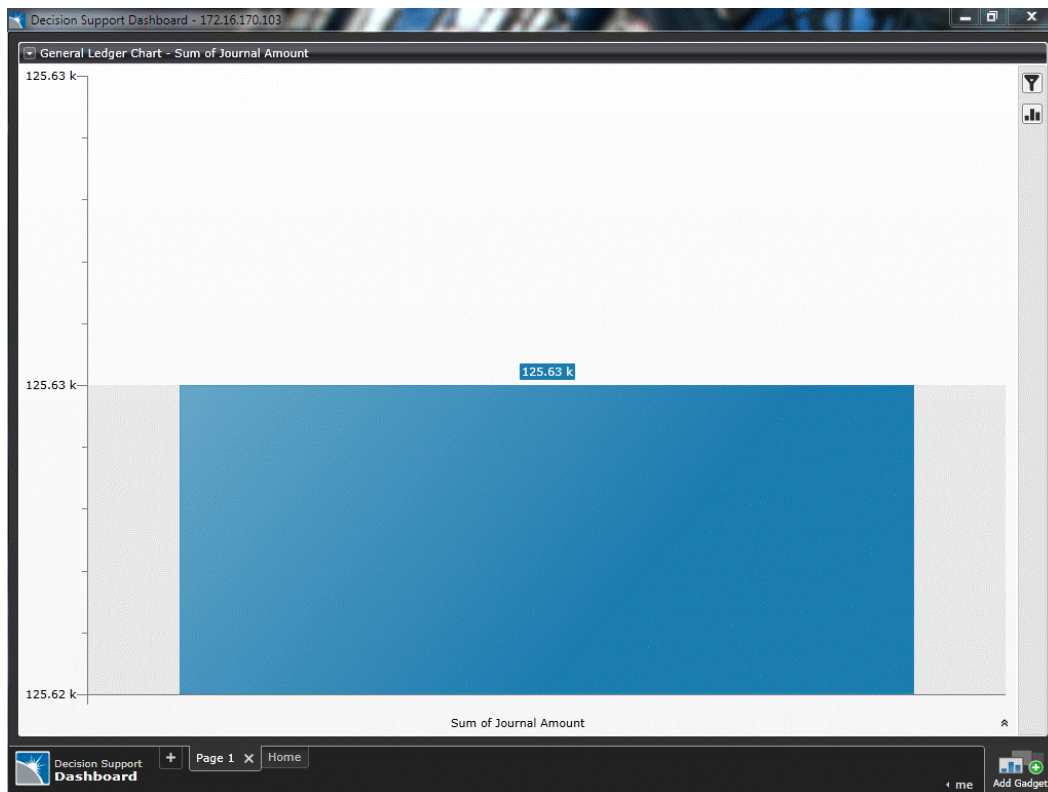
Add the General Ledger Chart gadget by clicking **+Add to page**.



In the *Aggregate* drop-down select Sum and choose Journal Amount as the measure to graph.

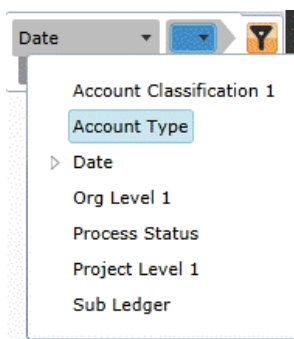


Close the popup by clicking the x in the top right side of the screen.

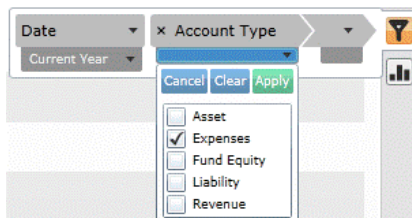


Configure Gadgets

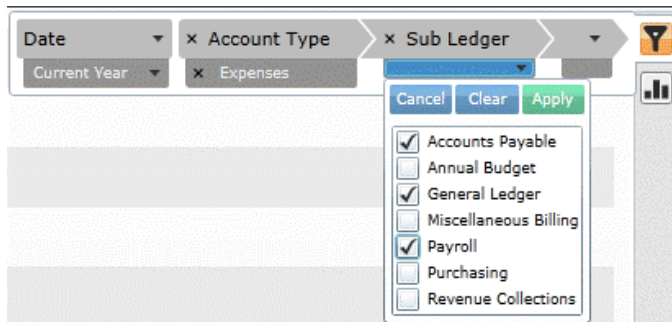
On the gadget, click on the Filter Icon to expand the filter options. Select Account Type.



Click the drop-down under Account Type and check Expenses. Click **Apply**.

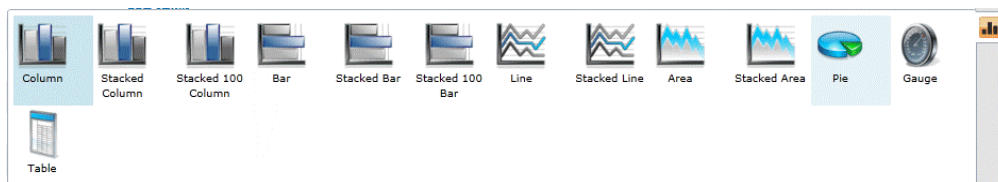


On the Filter, select Sub Ledger. Click the drop-down under Sub Ledger and check Accounts Payable, General Ledger, and Payroll. Click **Apply**.

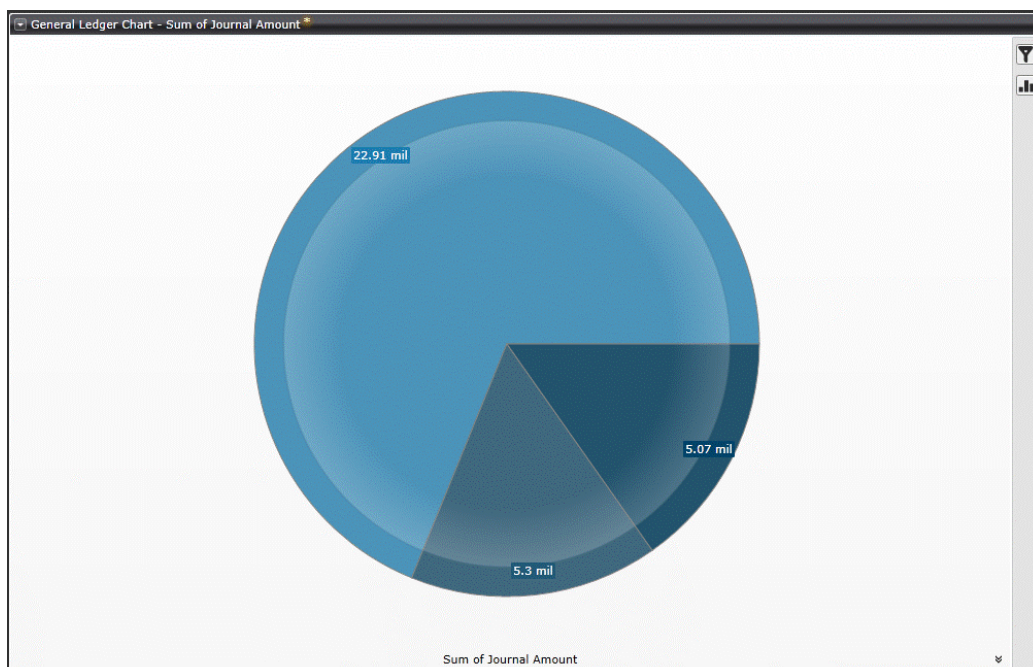


Click the Filter Button to collapse the filtering options.

Click the visualization button to select the kind of graph to view. Select **Pie** to change the way the data is presented.

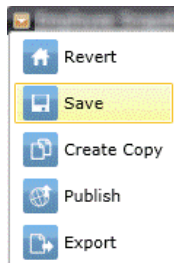


The result is show below.

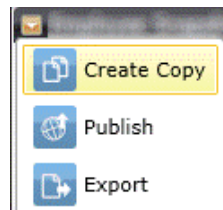


Save and Copy Gadgets

Click the drop-down arrow in the upper left of the gadget and click **Save** to save the gadget configuration.

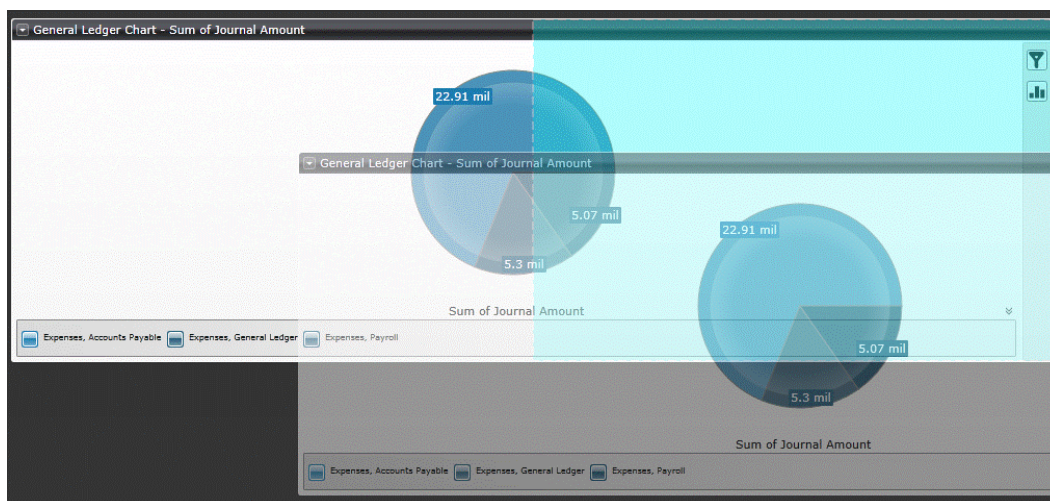


Click the drop-down arrow in the upper left of the gadget again and select **Create Copy** to duplicate the gadget you just configured.

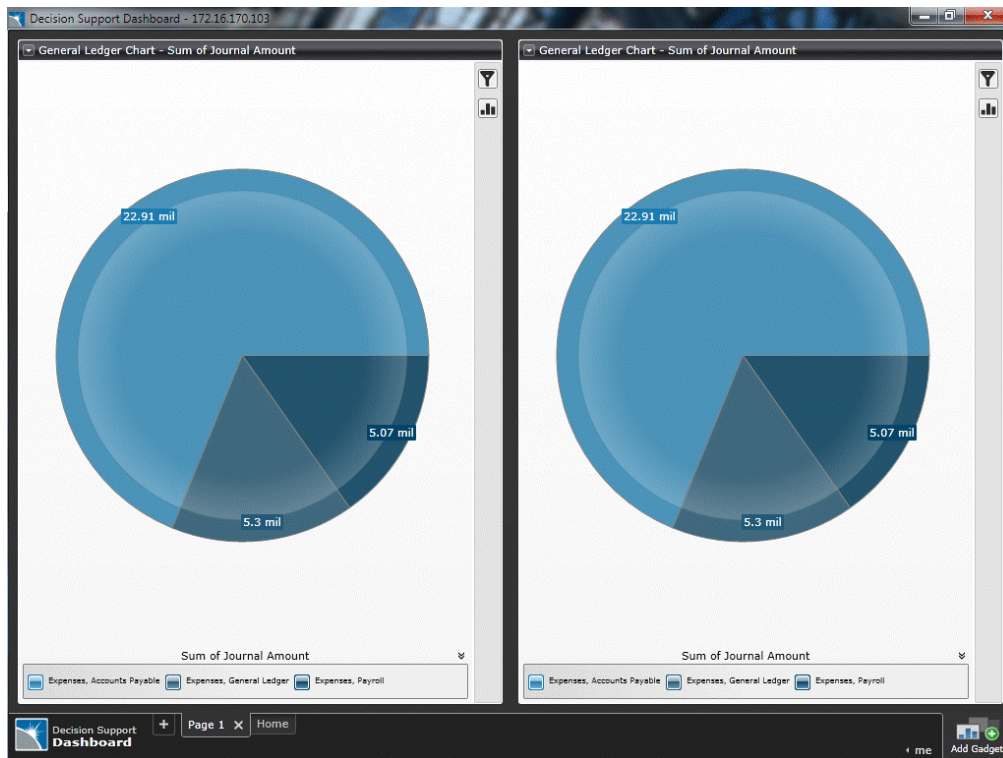


Configure Workspace

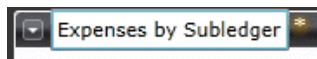
The Gadgets can be organized any way you like. In this example, we'll put them side-by-side. Drag one General Ledger Chart gadget to the right of the other General Ledger Chart to rearrange the Workspace.



We can also further customize how the Workspace is configured by resizing the columns. Hover your mouse in between the gadgets until the cursor changes to a double arrow. Drag the column size to the width you prefer.



To rename Gadgets and the Dashboard Tab, click twice on the name of the gadget, type the name you would like and then click the save icon.



Click twice on the name of the tab and type the name you would like for that tab.

